

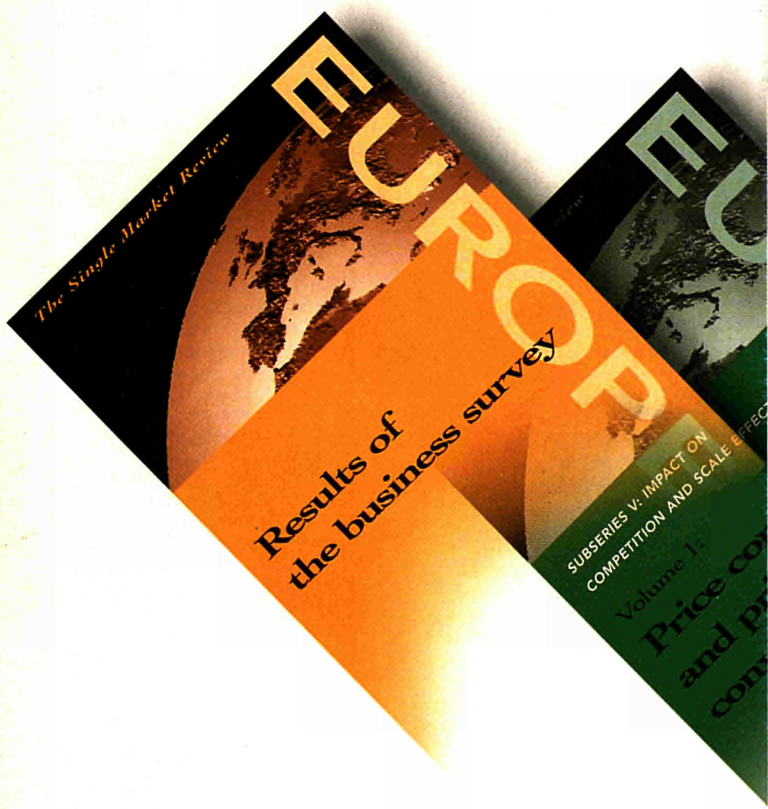


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single market

and
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A Progress Report from the European Commission
Presented by Mario Monti

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The Single Market Review



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The Single Market Review is written by leading subject experts, with the work coordinated by Directorates-General XV (Internal Market and Financial Services) and II (Economic and Financial Affairs) of the European Commission.



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These reports provide a detailed overview of all aspects of the single market, giving essential information to all those, worldwide, who are interested or involved in its development, as well as an invaluable insight into specific industry sectors for investors, analysts and corporate strategists. Written by leading subject experts and coordinated by specialists from the European Commission, there is no industry leader or analyst, policy maker or academic, who can afford to ignore them!

This series of reports has been written to conform with Council of Ministers Resolution 1218/92, which states that the European Commission is required to 'provide an overall analysis of the effectiveness of measures taken in creating the single market'.

I Impact on manufacturing



This series was researched and written in the context of the manufacturing industry and comprises five main elements:

- *Identification of all measures which have as their objective the removal of obstacles to cross-border transactions and competition.*
- *Measurement of the sectoral impact of these measures in terms of 12 stated variables.*
- *Impact on the determinant factors of strategy and behaviour.*
- *Validation of the analysis through the results of a limited number of case studies.*
- *Consideration of the repercussion of any necessary adjustments to the analysis upon the realization of other Community objectives.*

The reports consider the effectiveness of measures taken to complete a single European market and the resultant economic impact on the performance of manufacturers inside the European Union. They provide a detailed catalogue of relevant horizontal or market-specific legislative, legal and administrative changes related to the single market programme, which aim to facilitate cross-border transactions, as well as analysing their effectiveness.

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- *Environment*
- *Technical standards*
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Impact on services



These reports cover not only the main areas directly affected by the White Paper programme but extend beyond that to scenarios on the future impact of the liberalization of services. The five main elements considered are:

- *A thorough analysis of the effectiveness of relevant horizontal or market-specific legislative and administrative measures in removing obstacles within the single market for services.*
- *Identification of any shortcomings in the single market framework.*
- *Measurement of any shortcomings in the single market framework.*
- *Analysis of the importance of single market integration in influencing corporate strategy, through the study of companies' strategic behaviour.*
- *Validation of the above findings using several case studies, which consider the response of individual companies to the challenges of single market integration.*

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- *The impact on sectoral performance*
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Dismantling of barriers



Cross-border trade in many goods and services within the Community has been constrained by non-tariff barriers. Generally these have been the result of Member State governments seeking to protect domestic interests (fiscal regimes, consumer protection, health standards, etc.) without coordination with other Member States. This has resulted in trading in some goods and services between Member States being made very difficult. It is the dismantling of these barriers which lies at the heart of the single market programme.

These studies assess the progress and economic impact of dismantling the most important non-tariff barriers to trade, including such vital subjects as public procurement, intellectual property rights, customs formalities, capital markets and currency management.

Vol. III/1 Technical barriers to trade

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- *The sources of technical barriers to trade*
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IV Impact on trade and investment



Prior to the single market programme, the distribution of supply capacity inside the Community did not necessarily reflect the competitive advantages of different Member States, and economies of scales were inevitably inefficient. Therefore, the single market programme was bound to lead to a surge in intra-EU trade flows, relocation of production inside the Community and better exploitation of scale economies.

The studies in this sub-series examine the inter-related impact of the single market on trade and investment. They tackle the effect of the programme on the development of comparative advantage inside the EU, the single market's impact on third countries' access to the Community market, the EU's competitiveness vis-à-vis the rest of the world, and the effect on the source, volume and composition of foreign investment within the EU.

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V

Impact on competition and scale effects



The single market programme was designed to promote cross-border trade through comparative advantage and economies of scale which poses opportunities and risks. Opportunities include a much more competitive environment and the possibility that European firms can benefit themselves and their consumers by exploiting any economies of scale. However, now that Member States' markets are more integrated, there is the danger that the Community could become dominated by a few firms acting in their own interest or that Member States will favour nationally located businesses.

These studies examine the extent to which firms are now operating with a Community-wide perspective, the impact of the single market on the competitiveness of business inside the Community and the effectiveness of the competitive single market.

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VI Aggregate and regional impact



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